

FORM LM-30

LABOR ORGANIZATION OFFICER AND EMPLOYEE REPORT

This report is mandatory under P.L. 86-257, as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C 439 or 440.



READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

1. File Number U - <u>9197</u>	2. Fiscal Year Covered From: <u>1</u> / <u>1</u> / <u>2004</u> Through: <u>12</u> / <u>31</u> / <u>2004</u>
3. Name and address of person filing. Name <u>Robert</u> <u>C</u> <u>Kilpatrick</u> P.O. Box, Bldg., Room No., if any <u></u> Street <u>521 5th Street</u> City <u>Whitehall</u> State <u>Pennsylvania</u> ZIP Code + 4 <u>18052-6447</u>	4. Name, file number, and address of labor organization. Name <u>Iron Workers AFL-CIO LU 36</u> Labor Organization File Number <u>027-966</u> P.O. Box, Building and Room Number, if any <u></u> Street <u>521 5th Street</u> City <u>Whitehall</u> State <u>Pennsylvania</u> ZIP Code + 4 <u>18052-6447</u>
5. Position in labor organization. <u>Business Agent/Financial Secretary</u>	

Enter appropriate data below if, during the past fiscal year, you or your spouse or minor child directly or indirectly had any of the following interests (except as specified in the exclusions set forth in the instructions):

A. Held an interest in, engaged in transactions (including loans) with, or derived income or other economic benefit of monetary value from an employer whose employees your organization represents or is actively seeking to represent.	
6. Name and address of Employer (including trade name, if any). Name <u></u> Trade Name, if any: <u></u> P.O. Box, Bldg., Room No., if any <u></u> Street <u></u> City <u></u> State <u></u> ZIP Code + 4 <u></u>	7.a. Nature of Interest, Transaction, or Income. <u></u> 7.b. Amount. <u></u>

Signature

15. Signature and verification. The undersigned declares, under penalty of Perjury and other applicable penalties of the law, that all of the information submitted in this report (including the information contained in any accompanying documents), has been examined by the signatory and is, to the best of the undersigned's knowledge and belief, true, correct, and complete. (See the section on penalties in the instructions.)

Signed

On

8/12/05
Date

610-774-0433

Telephone Number

Name of Person Filing Robert Kilpatrick

File Number U-

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Iron Workers District Council of Phila

Trade Name, if any: Health Welfare and Pension Fund

P.O. Box, Bldg., Room No., if any

Street 6401 Castor Ave

City Philadelphia

State Pennsylvania ZIP Code + 4 19149

9. Business deals with:

☒ a. Labor Organization☐ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street

City

State

ZIP Code + 4

11.a. Nature of such dealing.

Trustee of Iron Workers District Council Health and Welfare and Pension Funds.

11.b. Approximate dollar value of such dealing.

12.a. Nature of interest held or income received.

Value of expenses related to attendance of International Foundation Conference.

12.b. Amount.

\$3,936

C. Received from any employer (other than an employer covered under parts A and B above) or from any labor relations consultant to an employer any payment of money or other thing of value.

13.a. Name and address of Employer or Labor Relations Consultant (including trade name, if any).

Name

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street

City

State

ZIP Code + 4

14.a. Nature of payment.

13.b. Is the Business an Employer ☐ or Consultant ☐ ?

14.b. Amount of payment.

Name of Person Filing Robert Kilpatrick

File Number U-

Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Iron Workers District Council of Phila

Trade Name, if any: Health Welfare and Pension Fund

P.O. Box, Bldg., Room No., if any

Street 6401 Castor Ave

City Philadelphia

State Pennsylvania ZIP Code + 4 19149

9. Business deals with:

☒ a. Labor Organization☐ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street

City

State ZIP Code + 4

11.a. Nature of such dealing.

Trustee of Iron Workers District Council Health and Welfare and Pension Funds.

11.b. Approximate dollar value of such dealing.

12.a. Nature of interest held or income received.

Value of expenses related to attendance at Board of Trustee meetings.

12.b. Amount.

\$2,507

Part B Continuation Page

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8. Name and address of Business (including trade name, if any).

Name Slough, Horneff & Fischer, P.C.

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 16 W. Vassar Road

City Audubon

State New Jersey ZIP Code + 4 08106-1624

9. Business deals with:

☐ a. Labor Organization☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Iron Workers Local 36 Annuity Fund

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 521 5th Street

City Whitehall

State Pennsylvania ZIP Code + 4 18052

11.a. Nature of such dealing.

Accountant for Annuity Fund and Local Union 36.

11.b. Approximate dollar value of such dealing.

12.a. Nature of interest held or income received.

Complimentary Tickets (2) NFL Game.

12.b. Amount.

\$140

Name of Person Filing Robert Kilpatrick

File Number U-

Part B Continuation Page

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8. Name and address of Business (including trade name, if any).

Name Ark Asset Mgmt Co., Inc.

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 125 Broad Street

City New York

State New York ZIP Code + 4 10004

9. Business deals with:

☐ a. Labor Organization☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Iron Workers District Council of Phila

Trade Name, if any: Health Welfare and Pension Fund

P.O. Box, Bldg., Room No., if any

Street 6401 Castor Ave

City Philadelphia

State Pennsylvania ZIP Code + 4 19149

11.a. Nature of such dealing.

Performs investment consulting and advisory services for the Welfare and Pension Funds.

11.b. Approximate dollar value of such dealing.

12.a. Nature of interest held or income received.

Value of meal provided at meeting.

12.b. Amount.

\$150

Name of Person Filing Robert Kilpatrick

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Part B Continuation Page

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8. Name and address of Business (including trade name, if any).

Name Smith Barney Group

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 325 Columbia Turnpike

City Florham Pike

State New Jersey

ZIP Code + 4 07932

9. Business deals with:

☐ a. Labor Organization☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name Iron Workers Local 36 Annuity Fund

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 521 5th Street

City Whitehall

State Pennsylvania

ZIP Code + 4 18052

11.a. Nature of such dealing.

Performs investment consulting and advisory services for the Local 36 Annuity Fund.

11.b. Approximate dollar value of such dealing.

\$19,050,000

12.a. Nature of interest held or income received.

Complimentary Yankee's Tickets (2).

12.b. Amount.

\$80

LM-30 Attachment

Ending date of report period: 12/31/04

LM-30 File Number: To be assigned

LM-30 Items
Number

8, 9, 11a and 11b	Per direction provided by U.S. DOL OLMS, Part B includes reporting of transactions including reimbursement of expenses by a trust in which the labor organization is interested as though the trust was a business. The information for item 11b is not in my possession.
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